Vice President for Finance and Administration
Framework for Success Champions Team Charge

Membership as of September 2023

Greg Balck, Student Accounts Receivable Manager, Controller’s Unit
Michael Bamberger, Manager of Emergency Preparedness, Department of Public Safety
Jargal Battulga, DFD Data Storyteller, DFD Information and Technology
Kendra Buford, Manager of Deposits and Cash Handling - Treasury Operations, Controller’s Unit
Lane Byrnes, Accounts Payable Supervisor, Controller’s Unit
Kayla Campbell, Associate Director of Budget Analytics; Budget & Resource Planning
Hanna Emerson, Construction Contracts Supervisor; Procurement, Contracts & Materials Management
Dan Harlan, Radiation Safety Officer, Environmental Health & Safety
Morgan Hatch, Payroll Accounting Compliance Coordinator, Controller’s Unit
Danny Hough, Associate Director of Project Management, Enterprise Project Portfolio Management Ofc.
Manmeet Singh Khetarpal, Business Analyst, Enterprise Project Portfolio Management Office
Renee Lyon, Travel & Expense Manager, Controller’s Unit
Mike Mandzuk, Director of Compensation and HR Data Analysis, University Human Resources
Erin Martin, Director of Communications and Web, DFD Information and Technology
Richard Prewitt, Fiscal Coordinator – Financial Accounting and Reporting, Controller’s Unit
Bonny Ray, Executive Director, University Human Resources
Melanie Rose, Manager of DFD Strategic Initiatives (F4S Champion Lead)
Lisa Silbernagel, Associate Director of Research Administration and Accounting, Controller’s Unit
Katie Vorderstrasse, Assistant Director of Insurance and Risk Management Services
Carolyn Warfield, Director of HR Strategic Partners, University Human Resources
Monika Watkins, Director of Capital Project Delivery; University Facilities, Infrastructure & Operations

Background

The DFD Framework for Success (F4S) is a comprehensive approach to supporting informed and transparent decision-making across the division for the benefit of the university. Vice President Mike Green was seeking a data-driven answer to the question how are we doing as a division? In response, DFD leaders started developing the F4S program in 2017, working with Dr. Javier Calvo-Amodio, an OSU assistant professor of Industrial and Systems Engineering, and his team of graduate research assistants to create a program by and for Division of Finance and Administration employees.

Built on the foundation of OSU’s core values—accountability, diversity, integrity, respect and social responsibility—the DFD Framework for Success allows for an open and collaborative culture where everyone can contribute their expertise and ideas. It has three main elements:

1. Guiding principles
2. Key performance indicators (KPIs) and key activities
3. Division-wide performance measures and unit-level metrics

DFD units began full implementation of the Framework for Success in 2021, with teams following an 8-step implementation approach to map their metrics to the key performance indicators and DFD performance measures, identify key stakeholders, define metric threshold levels, and identify the ideal
cadence and responsibility for updating the data and visualizations over time. A group of “dashboard” experts from DFA IT and other units, including members of Dr. Calvo’s team, came together to assist DFA units in designing usable metrics and management dashboards, incorporating feedback from DFA senior leaders. A major milestone was achieved in FY22, with the completion of 25 dashboards displaying 67 unit-level metrics across the division. In FY23, units tracked baseline metrics and made refinements.

In FY24, Vice President Green is charging a new DFA Framework for Success Champions Team to bring responsibility for the ongoing development, maintenance and oversight of the Framework program and unit metrics fully within the division. During FY24, Dr. Calvo and his research team will hand off responsibility for administering metrics and dashboards to the Champions Team, while completing development of two assessment tools for use in the maintenance stage of the program. Dr. Calvo and his researchers will continue to have access to data and information to enable ongoing research and academic growth in this field.

Charge

The key activity of the Framework for Success Champion Team is to integrate the various perspectives of unit-level work into a division-wide system that supports the sustainability of the Framework within DFA culture. To achieve this outcome, the team will:

- Possess deep understanding of the structure and operation of the F4S program, including working knowledge of underlying concepts and theories.
- Understand how unit-level metrics teams are thinking, understanding and interacting with the Framework.
- Oversee the ongoing functioning and performance of the F4S program and its component parts, recommending updates as needed to the vice president.
- Champion the F4S within DFA units and organize the maintenance of unit metrics.
- Develop and implement communication plans that regularly share outcomes and insights arising from F4S metrics and dashboards.

Additionally, the team will be responsible for:

- Marketing and promoting the F4S and its use across the division.
- Providing DFA employees across the division with training opportunities for the F4S.
- Providing support for the conceptualization of new metrics, metrics development and updates to existing metrics (in collaboration with the F4S dashboard team).

The F4S Champion Team will develop an annual work plan and provide regular (at least quarterly) updates about their work and outcomes to Vice President Green and division senior leaders.

Team Roles

**DFA Framework for Success Unit Champions** advocate, steward and manage the Framework for Success within their work unit/department to ensure consistency in its application and evolution. They represent their unit/department on the F4S Champion Team and serve to:

- *Gauge the performance of the Framework and unit metrics* by identifying improvements; assessing, tracking and reporting on metrics; providing updates on the health and progress of the framework; monitoring engagement with and use of the Framework within the unit.
• Actively engage as a member of the Champions Team to understand and inform guidance, training and effective change management communications.
• Act as a liaison for information and understanding about how unit teams are thinking about and interacting with the Framework; represent the individual unit’s perspective and needs among the team; share learning and information with unit leaders and across the division.

F4S Unit Champions are assigned by DFA senior leaders based on their position in the unit. Ideally, Unit Champions exhibit a passion for operational excellence and a curiosity for why and how things happen; they employ a systems perspective and understand the interconnections of work across units; and they know how unit metrics function and are being used.

The DFA Data Storyteller works with functional units as a central resource for the realization of Framework for Success metrics through visualization, implementation, maintenance and evolution. The Data Storyteller serves as a technical and tactical subject matter expert to assist the team in:
• Visualizing information by assisting functional units in reporting, modifying and creating new visual dashboard elements for metrics.
• Implementing data visualizations to ensure a consistent look and feel for information dashboards.
• Maintaining updated metrics by working with unit data stewards to regularly refresh dashboards, troubleshoot issues with data systems and maintain a long-term F4S database
• Evolving the Framework by assisting functional units to modify and create new metrics visualizations over time.

The DFA Data Storyteller serves on the Champion Team because of their role as a subject-matter expert and resource.

The Framework for Success Champion Lead is responsible for advocating, stewarding and managing the Framework for Success across the division to ensure consistency in its application and evolution. The Champion Lead will:
• Convene the F4S Champions Team on a regular basis, supporting engagement with and across all units.
• Coordinate the Champions Team to oversee and maintain the operation of the F4S program.
• Develop and implement change management and communication plans with input from Unit Champion, and provide guidance and training related to those plans.
• Collaborate with DFA IT optimize reporting, monitoring and process automation.

The F4S Champion Lead also serves as liaison with the DFA Senior Leadership Team, providing updates on the health and progress of the Framework, and coordinating closely with division-level strategic planning, performance reporting and communication efforts. The F4S Champion Lead is assigned by the vice president for finance and administration.

Meetings

The F4S Champion Team, comprising the Lead, the Unit Champions and the DFA Data Storyteller, will determine a regular meeting cadence necessary to oversee the maintenance of the DFA Framework for Success as described in the charge.